

VOCUS ONLINE BEHAVIOUR

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Prepared by

PERCEPTIVE





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OVERVIEW

Vocus commissioned Perceptive to help understand New Zealanders attitudes towards, and participation in digital piracy (downloading / streaming / viewing copyright / licenced material without paying for it).

Methodology

To achieve the objective, Perceptive designed an online survey targeted at a nationally representative sample of internet users aged 18+ years.

The survey was completed by 1,000 respondents and was weighted to Statistics NZ census data (age, gender and region). The margin of error is +/- 3%

The survey was live between 21st and 27th December 2018.

KEY FINDINGS



Netflix is killing content piracy

Half of all people around New Zealand have watched something that may have been pirated at some point in their lives.

But it appears that the “golden age of piracy” in the modern day is changing: the majority of people nowadays rarely or never watch pirated collateral, watch less pirated material than they used to, and they believe this behaviour will continue in the future as well.

This change appears to mostly be due to easy access to free and paid on-demand material through services like Netflix and OnDemand.

Despite this reduction in appetite for piracy, people still believe that “it would be almost impossible to stop people” from pirating something if they really wanted to.

The logic appears to be centred around the diaspora of pirate sites; that if the most popular ones were blocked, people would simply get their material elsewhere, from the “10 or more” pirate sites that people believe exist.

While New Zealanders have little sympathy for those who do pirate, it appears that, from their perspective, censoring certain sites to reduce piracy is an exercise in futility.

People believe piracy will continue to decline in the future.

VIEWING METHODS - ALL



You are most likely to catch Kiwis viewing free-to-air TV, on-demand channels, watching movies the old-fashioned way (at the cinema) or watching Netflix or similar paid streaming.

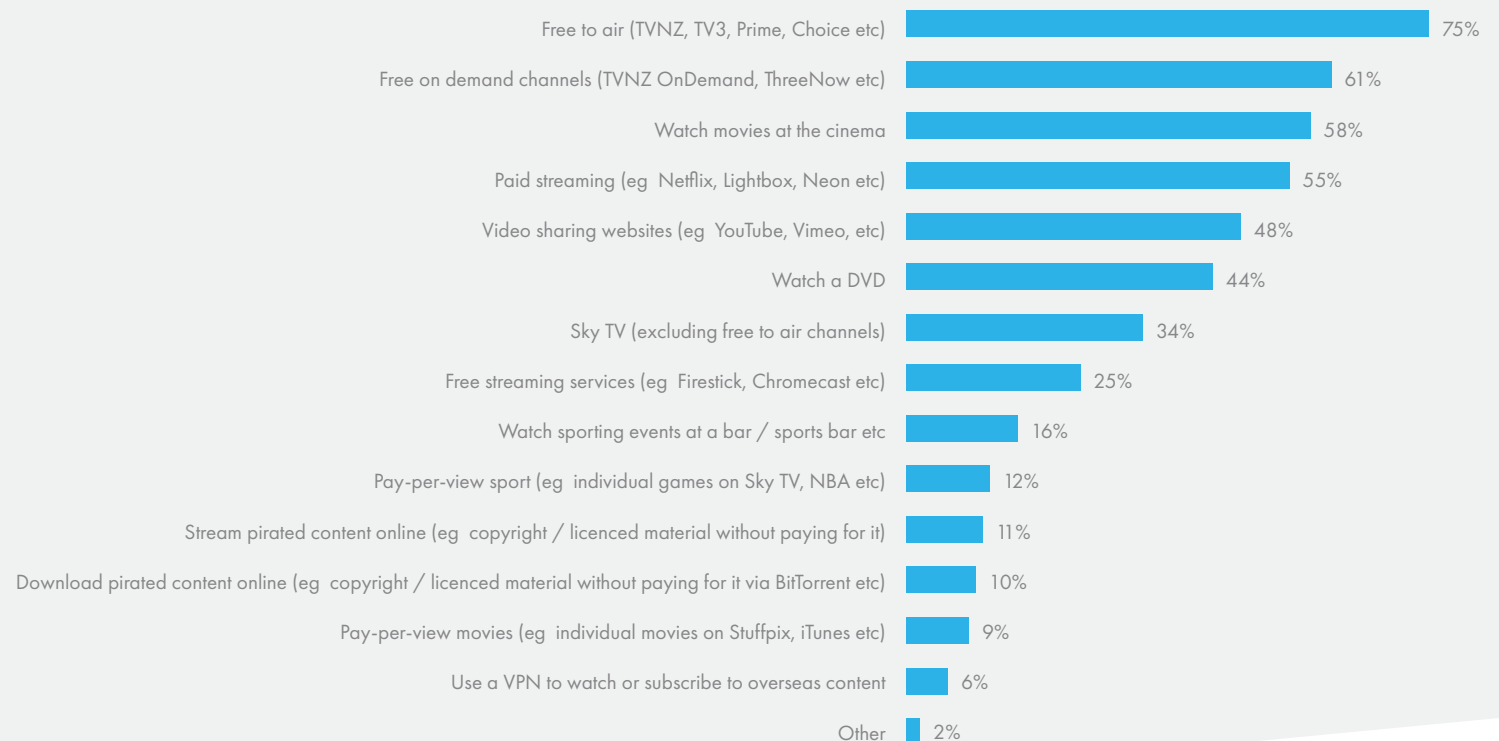
Younger Kiwis (under 34 years) are the most likely to be streaming or downloading pirated content online.

Question: Please select all the ways that you would normally view movies, TV shows, sporting events?

On average people view content using **5** of these different methods.

Pirates are more likely to use **7** methods.

Base: All (n=1000).



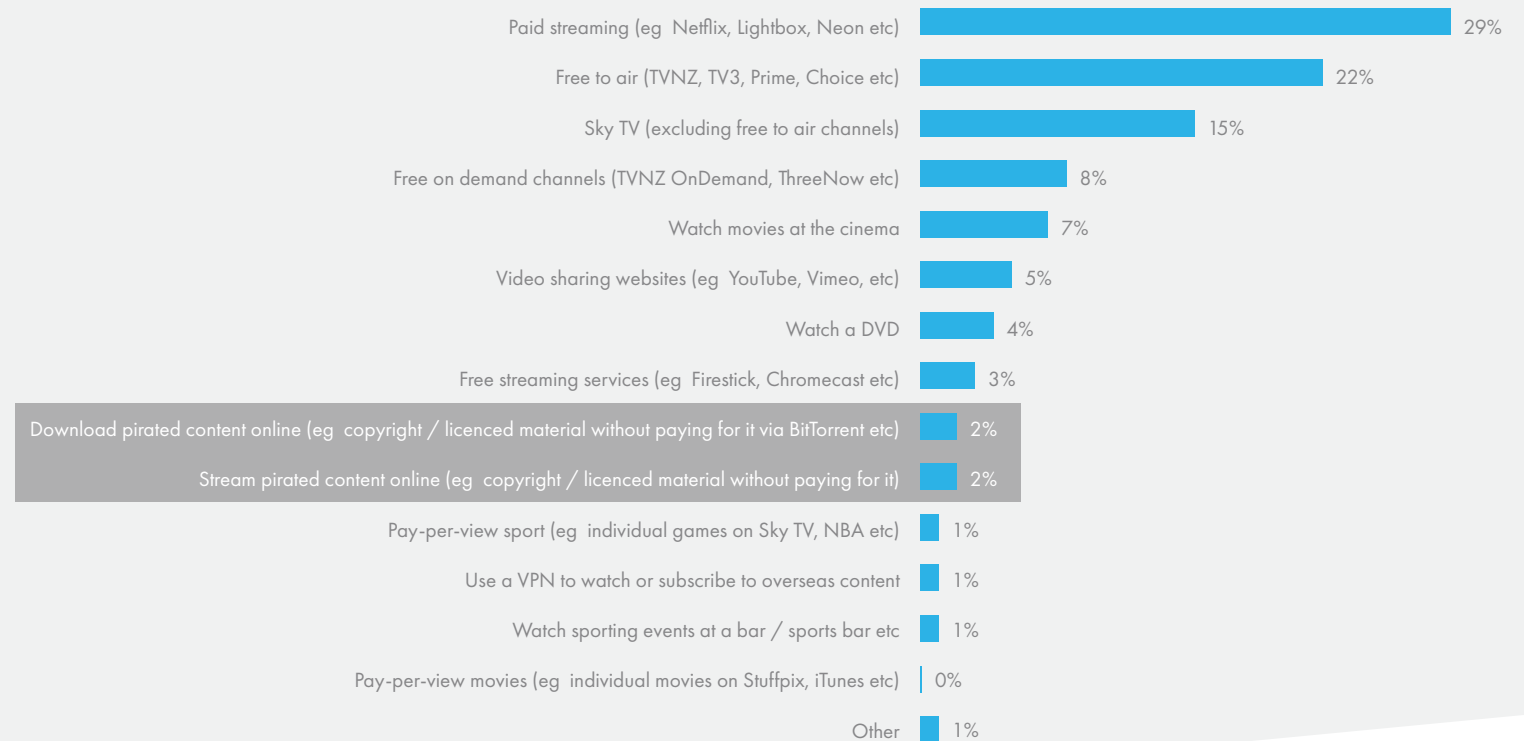
VIEWING METHODS - PREFERRED



Paid streaming is the preferred method of almost a third of Kiwis. Females are more likely to prefer this method (34%).

Only 3% of respondents prefer to download or stream pirated material, with 18-24 year olds especially likely to do so (10%).

Questions: And of those, which is your current preferred way to watch movies, TV shows, sporting events?



Base: All (n=1000).

VIEWING BEHAVIOUR

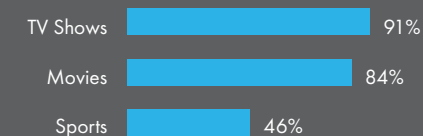
Almost all Kiwis watch TV shows (91%), closely followed by movies (84%). Less than half normally watch sports (males more likely at 64%).

Over a third of respondents say they watch those things daily.

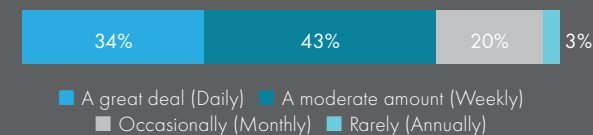
Base: All (n=1000).



Question: Which of the following would you normally watch? (Select all that apply)?



Question: How often do you view movies, TV shows, sporting events using your preferred method mentioned earlier?

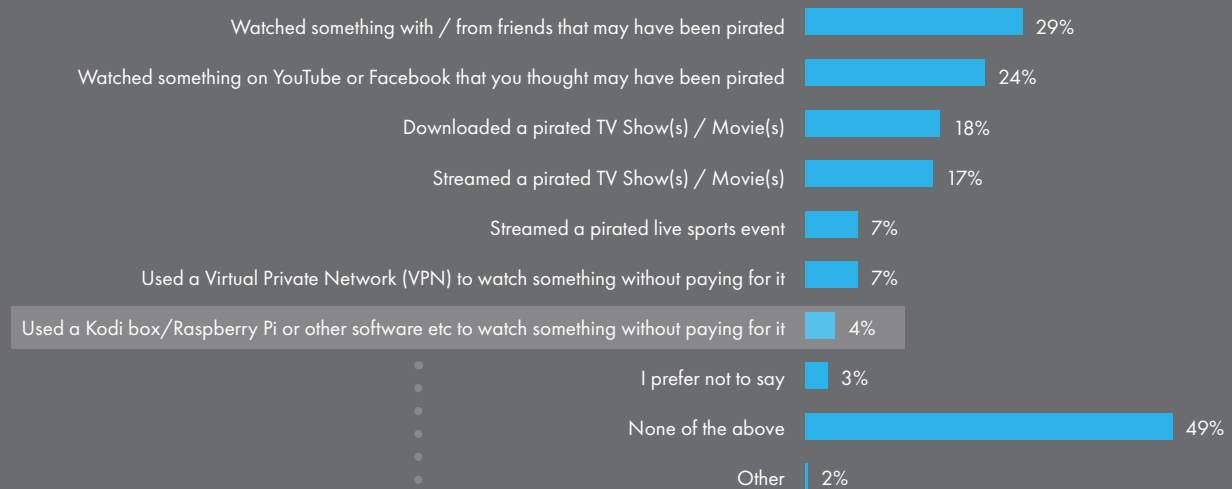


METHODS OF PIRATING MATERIAL

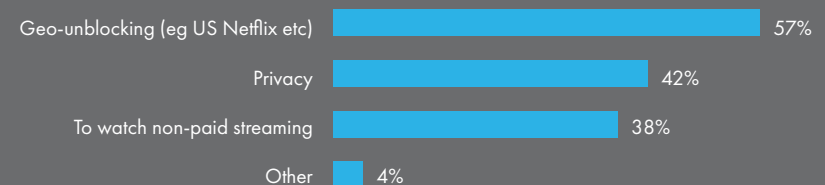
Half of respondents have never pirated anything ever. Of those who have ever watched something illegally, the majority have been given something from a friend, or watching something on YouTube or Facebook that may have been pirated.



Question: Have you ever done any of the following?



Question: What are your reasons for using a VPN? (Select all that apply)



Base: All (n=1000).
Base: Those who have ever used a VPN (n=69).

FREQUENCY OF WATCHING PIRATED MATERIAL

Of those who have ever viewed pirated material, the majority rarely do so nowadays, and overall do so less often than they used to.

Main reasons for doing so were because of better content availability now (through Netflix and similar).

Base: All (n=1000).
Base: Those who have ever watched pirated material (n=482).

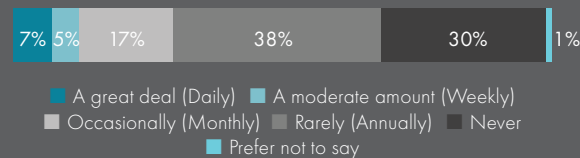
Question: Out of every 10 x TV shows/ movies/sports events you watch at the moment, how many would be via pirated content? (average)



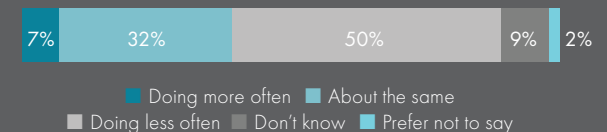
Question: And thinking back to 1-2 years ago: out of every 10 TV shows / movies / sports events you watched, how many were via pirated content?



Question: On average how often would you typically do those things nowadays?



Question: And overall do you do these things more or less often than a year ago?



REASONS FOR WATCHING LESS PIRATED CONTENT



Main reasons for watching less pirated content now were because of better content availability through Netflix and similar.

- › Sites like Netflix provide a great alternative.
 - › No need to with Netflix.
 - › Netflix is accessible now so I'm doing it legally or choosing to watch Netflix over something I need to pirate.
 - › Netflix and free providers have more content.
- › More content available through legal streaming sites these days.
 - › More content available at prices I'm willing and able to pay.

Questions: Why do you watch pirated content less frequently than a year ago? (open)

Base: Those who do these things less often (n=241).

INTENTION TO VIEW CONTENT LEGALLY IN THE FUTURE

With so few people watching content illegally, it is no surprise that the majority don't see this changing in the future

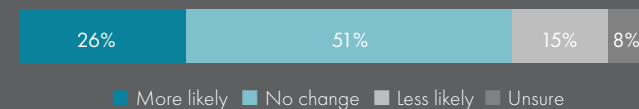
Base: All (n=1000).



Question: What makes you answer that way (open)
Selection of responses from those who answered
"more likely"?

- > *It will be so cheap & easily accessible u won't need to pirate it.*
- > *Becoming the new norm for watching shows etc.*
- > *Geo locked content is now becoming obsolete.*
- > *I want to abide with the law.*
- > *Because in the future there will be even more things to watch online.*
- > *The prices for paid content is getting competitive so there are some good deal.*
- > *It's getting really hard to watch pirates stuff. Not worth it.*
- > *You get what you pay for.*

Question: Compared to now, do you think you will be more or less likely to pay to view content legally in the future?



PIRACY SITES

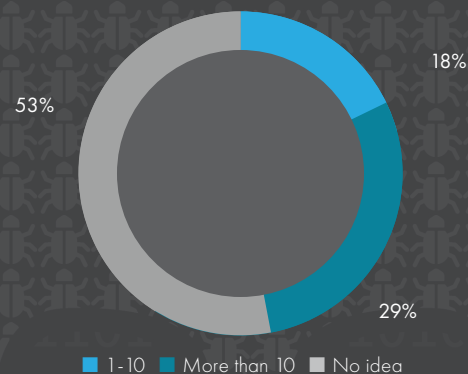
Majority of Kiwis have no idea how many different sites there are to view pirated content. However, almost a third assume there are more than 10.

Most can't name more than 1 or 2 sites. However they assume that if they were no longer accessible, people would simply get their pirated content elsewhere, use a VPN to get around it or get it from friends.

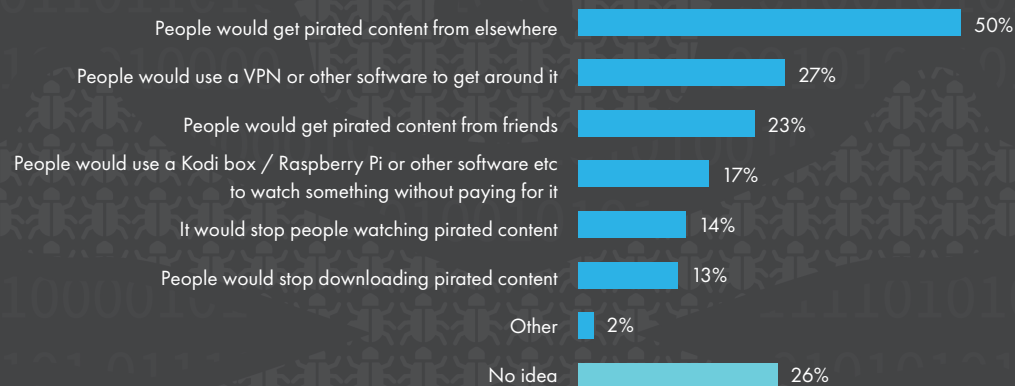
Questions Please list all the pirated sites you have heard of (open, 8 boxes). Word cloud below.

none
cant remember
mega upload
putlocker
123 movies
pirate.bay
torrent
do not know
youtube
unsure
bitorrent

Question: How many different sites do you think there are to stream / download pirated movies / TV shows / Sports events?



Question: What do you think would happen if the most popular piracy sites were no longer accessible? (Select all that apply)

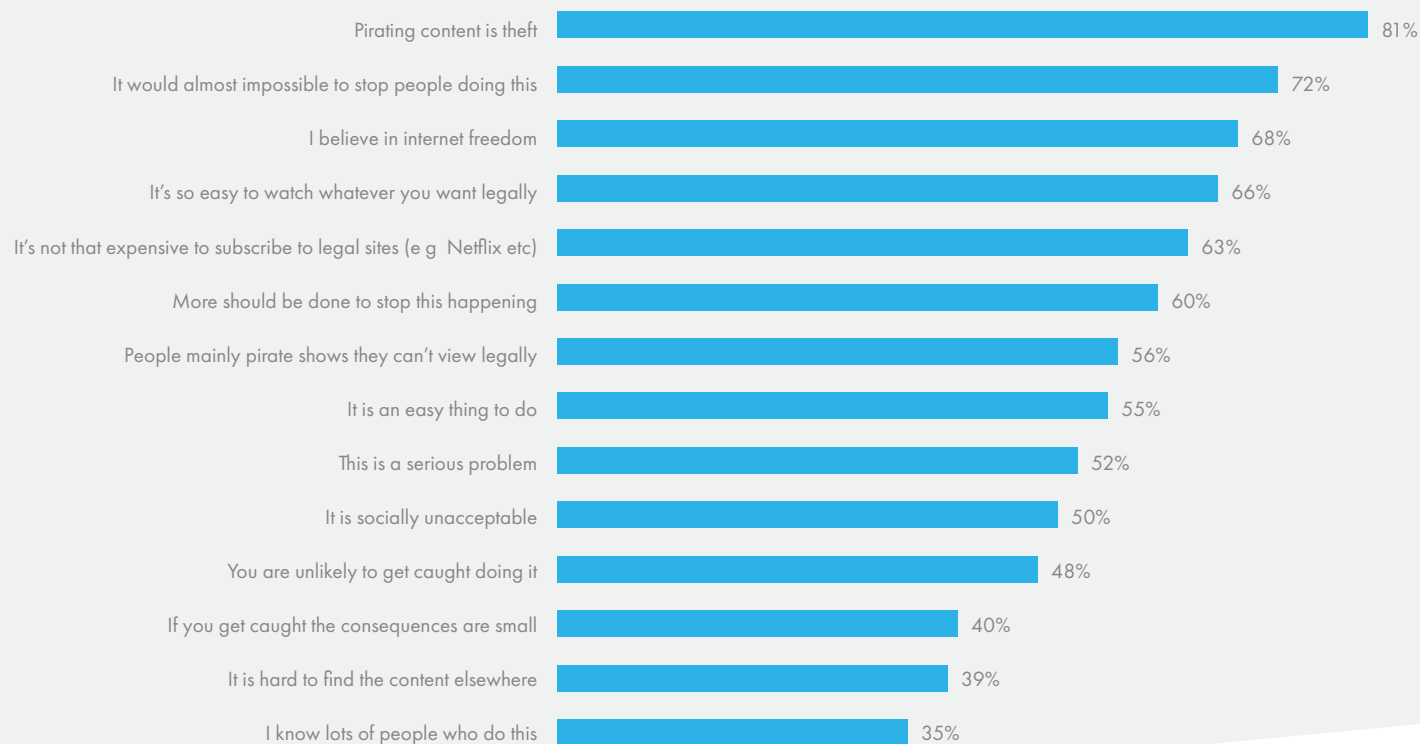


Base: All (n=1000).

PIRACY SENTIMENT

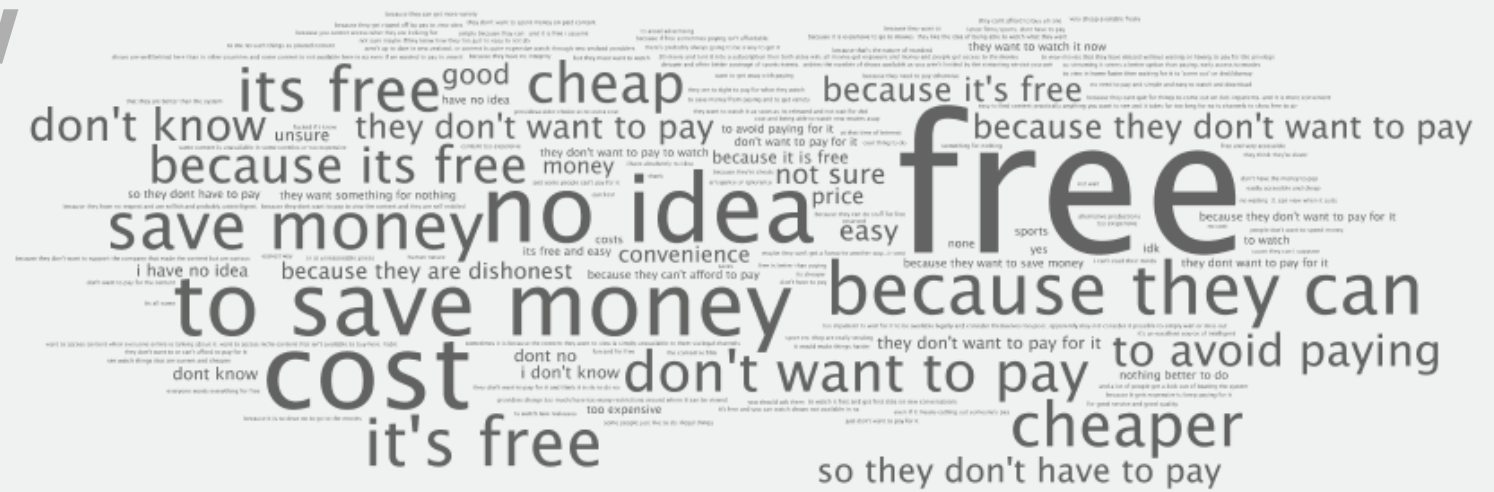
Kiwis think that pirating is theft but they also think that it would be almost impossible to stop it. They think that it's easy and not that expensive to watch whatever you want through legal avenues.

Questions: Thinking about people watching pirated movies, TV shows or sporting events, to what extent do you agree or disagree with the following statements? Total 'Agree'.



Base: All (n=1000).

PEOPLE VIEW
PIRATED
CONTENT
BECAUSE
IT IS NOT
READILY
AVAILABLE
ELSEWHERE



Questions: Why do you think people stream / download pirated content? (open)

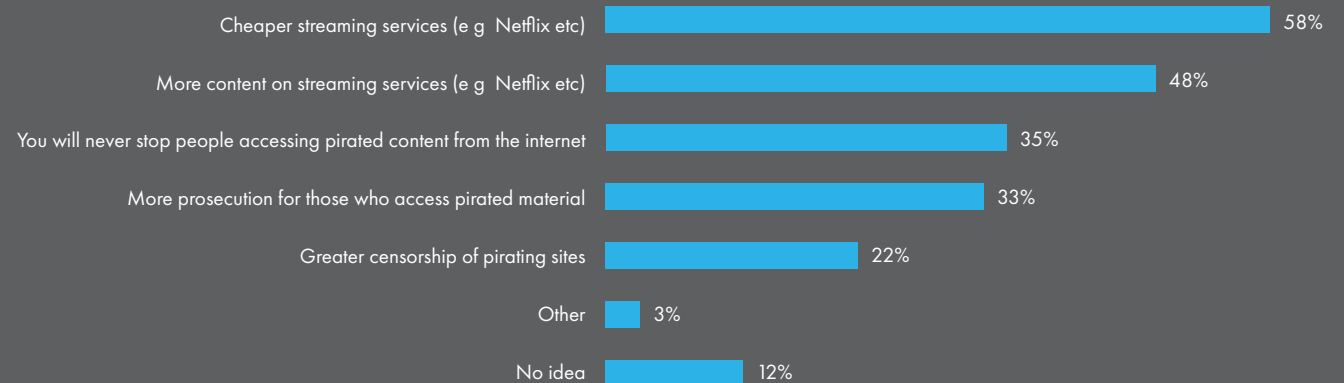
- Want it now when rest of world has it. Can't offered to go to movies or buy it.
 - Typically because the shows they want to watch are not available locally or they don't wish to sign up to multiple different online streaming platforms.
 - Too mean to pay and support the people that make the TV programmes and movies.
- To watch new release movies that haven't been brought out at the movies yet or movies that have or old movies for any genre.
 - To get movies etc for free and faster.

Base: All (n=1000).

PREVENTING PEOPLE PIRATING CONTENT

Therefore, Kiwis think the way to prevent people from pirating content is to have cheaper streaming services and more content rather than necessarily trying to censor pirating sites.

Question: What would be the most compelling reasons that would prevent people from pirating content from the internet? (Select all that apply)



Base: All (n=1000).



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